

Waiting List Entry/Change Form Instructions (rev. 2/16/2012)

The Waiting List Change/Entry Form is used with a new referral, when placing a person on the Master Wait List for Developmental Disabilities Program (DDP) services, when updating a referral, when changing a person's waiting or planning status, or when removing a person from the Master Waiting List (also called the Master Screening List.) This waiting list will be used for Screenings to identify individuals who qualify to be screened for resources vacancies as they become available. It will also be used for planning purposes - a person with a future desired start date (more than 30 days after the date of a screening) will not be considered for current screening but will be tracked as that future date nears. Individuals with incomplete referrals or referrals that have not be updated as required in the Screening for Adult and Children's Group Home Services or the Children's Waiver Services policy will not be considered for Screenings.

The use of this Waiting List Entry/Change Form serves several purposes:

- A. Provides documentation of requested placement or changes on Master Waiting List
- B. Provides all the information needed by the Regional Administrative Assistant (AA) when entering people on the Master Screening List.
- C. Assures proper identification of DDP service waiting and planning options.

This form is initially filled out by the Case Manager when placing an individual on the waiting list for services. The form will subsequently be used when updating a referral, closing a referral, and/or changing the services, desired locations, or desired start date for a person already on the waiting list. When making a change be sure to list all the services and locations a person desires, not just those that change. When changing the services desired make sure the referral and MONA (or EICP) correspond with the change. Required information indicated in the following explanation of items must be provided for initial entries. Other items are desired but not required. Please attempt to provide all information.

The form can also be used to close a person's waiting status for a particular service or for all services. This is done as a "Change" or an "Annual Update" and "Change" by writing "close" in the "desired Start Date" box preceding the service. Closing a person waiting status for all service is done as a "Close All Waiting". A reason for closing is required in the "Comments" section whenever the waiting status for service(s) is closed.

Once completed by the Case Manager the original is signed and sent to the DDP Administrative Assistant -for now (along with the referral packet for new entries to the waiting lists, or Annual Update referral information as needed/required.) To change a person's waiting status send the form to the DDP Administrative Assistant (for now. You may want to keep a copy of the form you send while you wait for confirmation of proper entry on the Master Waiting List.

The DDP Administrative Assistant (for now) will forward the form and referral to the correct QIS. The QIS will review the form for completeness and consistency with the referral packet (or PSP Planning document for changes). If the form includes a new entry waiting for Community Supports **the eligibility date for Community Supports will be filled in by the QIS.** This is the date a completed Community Supports referral is received, or the desired start date, or the person's 18th birthday, whichever is the latest. The QIS signs the form and sends it to the regional Administrative Assistant. The desired start date for any service cannot be earlier than the first date a complete referral or update to a referral adding a service was submitted by the Case Manager for entry on the Master Waiting List.

The regional Administrative Assistant (AA) enters the information in the Master Waiting List. The AA signs the form when entry is completed and keeps the original on file. Entry on the waiting lists can be

confirmed by Case Managers by viewing the DDP Wait List Report available in the AWACS ICP system.

Following is an explanation of the items of information requested on the Waiting List Entry/Change Form:

(The form is set up so information can be electronically entered onto the lines. To check the boxes, right click on the box, select properties and another box will appear then click on "checked" and it will fill it in with an X.) **Item titles in bold are required.**

New, Annual Update, Change, or Close All Waiting:

Required. Check the one that applies.

- Mark "New" if this person is not currently on the waiting list.
- Mark "Annual Update" if it is a complete Annual Referral Update.
- Mark "Change" if there a change to previously submitted information on this form. An Annual Update that does not change any of the waiting information on the Wait List Entry/change form will have only the "Annual Update" box checked. If an Annual Update changes waiting information on the form both "Annual Update" and "Change" would be checked. Check only "Change" if the form only changes waiting information and is not accompanied by a complete "Annual Update".
- Mark "Close All Waiting" if the person is to be completely removed from the Master Screening List. Closing waiting status requires an explanation in the Comments section of the form.

Name:

Required. Last and first are required, middle is desired. Consistency in the name and spelling are very important. Be sure your initial entry is correct and use the same name and spelling on updates.

DD Eligibility Date:

Required. Enter the date this person was determined to be Developmentally Disabled by the DDP QIS.

SS#:

Required. It is very important to report this and report it correctly. Please enter information using dashes (-), for example: 999-99-9999.

Birth Date:

Required. Please enter information by month/date/year. For example: mm/dd/yyyy.

AWACS ID:

Required

MONA or EICP amount:

Required. Enter the annual MONA amount from the Web MONA or if the individual's needs fall outside the validity range of the MONA an Estimated Individual Cost Plan (EICP) amount may be entered. Check which amount is being entered (MONA or EICP) and enter the amount.

The Mini-MONA used in Children's Waiver Services is completed at the time the child is referred for CWS.

CS MDC FES WSSH:

Required. If the individual is in Community Support Services check "CS", if they are in MDC check "MDC", If they are in Family Education & Support (FES) GF or Part C check "FES". If they are in Warm Springs State Hospital check "WSSH".

Medicaid Eligibility:

Required. Check “Y” if the person is Medicaid eligible. Check “N” if the person is definitely not Medicaid Eligible, and check “U” if the person is not currently Medicaid eligible but may be.

Case Manager/Agency:

Required. Enter the last name of the Case Manager or Waiver Children’s Case Manager (WCCM) to whom this case is assigned and the name of the Case Management agency .

Address, City, Zip:

Required. Record the individual’s residential address, City, and Zip code.

Gender:

Required. Enter; “Male”, “Female”, or “unknown.”

Ethnicity:

Desired information (not required), see the attached Wait List Response List for options.

Tribe:

Desired information (not required), see the attached Wait List Response List for options.

Hispanic:

Desired information (not required), leave blank if non- Hispanic. If Hispanic see the attached Wait List Response List for options.

Veteran:

Desired information (not required). Please indicate whether the person is a Veteran.

Education level:

Desired information (not required). Report number of year of school completed up to 12. If special education - indicate so by SE. (Example 12SE means attended at least 12 years some of which was in special education classes.)

Marital:

Desired information (not required), see the attached Wait List Response List for options.

Home phone:

Desired information (not required).

Place on the waiting list for the following services:

Desired Start Date:

Required.

- For new waiting service entries enter the desired start date in front of each desired service. The desired start date for a service cannot be earlier than the first date that service was submitted by the Case manager on the Wait List entry change form. The desired start date cannot be before the person would be age eligible for the service (i.e. for community supports a person must be 18).
- **For referral updates the desired start date should remain the same as initially indicated.**

Waiting Choice or Planning Choice:

Required.

- If the desired start date is no more than 90 Days beyond the date the Case Manager is completing this form “Waiting” should be checked and a complete referral must be or have been submitted.
- For desired start dates beyond 90 days “planning” should be checked and a complete referral is not required (this planning status must be updated at least

every 365 days.) People in planning status will not be considered for screening until a completed referral is received and the desired start date is not more than 30 days prior to the screening date. As the planning date draws near Case Management is responsible for assuring an updated referral and MONA (or EICP) correspond with the new waiting service(s).

No more than one waiting choice is to be marked in the Day Services area and mark **no more than one waiting** choice in the Residential Services area.

Community Supports cannot be selected if any of the group living options are selected or if the total service needs (residential and work/day combined) are higher than what can be purchased under Community Supports services.

DDP assigned CS eligibility date: (QIS requirement)

If referred for CS the DDP QIS will fill in the eligibility date which cannot be prior to the date the QIS receives a complete referral and not before the person referred reaches age 18.

Desired Locations:

Desired City: At least one entry here is required. Indicate the desired locations (city/ town) of services in order of preference. Only fill in as many choices as the person is willing to accept up to a maximum of three. The choice should not be changed more than once per year unless there are changes in circumstances (i.e. a family move) that warrant a change. For Children's Waiver Service (CWS) list any city in the Region of residence for City A.

Wait List Response List:

Ethnicity:

White	Asian	Alaska Native	American Indian	Native Hawaiian/Other Pacific Islander	Black or African American
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Tribe:

Assiniboine	Blackfeet	Blood	Chippewa
Chippewa Cree	Crow	Flathead	Gros Ventre
Kootenai	Little Shell	Nez Perce	Northern Cheyenne
Piegian	Salish	Shoshone	Sioux
Turtle Mountain	Yanton Tribal Affiliation	Tribe Unknown	Not Domiciled

Hispanic:

Cuban	Mexican	Other Hispanic	Puerto Rican	Unknown
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Marital status:

Divorced	Life Partner	Married (includes "common law"	Never Married (includes annulled)	Separated	Widowed
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